

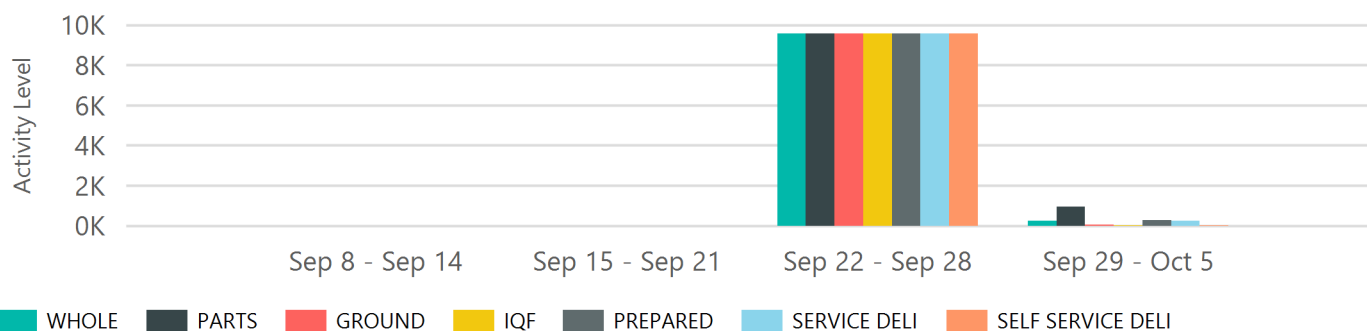


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MARKET HIGHLIGHTS

National summary totals continue their decline into the second ad period of the new month. The one bright spot is incentives to purchase which increase significantly in most regions of the country. The whole bird category reduces price slightly, while volumes remain about the same. B/S breast offer a few deals in bulk pack; tenders also lower prices slightly. Split breasts are back on the scene after taking a rest during last week's run. Leg quarters drop volumes and price, Thighs and drums also reduce volumes and price this week. IQF pushes party wings with an increase in volume and a price hike. The deli offers fried eight piece and finger foods. Specialty items pushes dark meat and breast items. Organics wait for another day. Retailers continue to offer early enticements to consumers to pick up their upcoming seasonal items.

Weekly Activity Index



NATIONAL

METRICS

	Current Week	Previous Week	Previous Year
Total Outlets	28,820	28,820	
Activity Index	2,933	572,300	
Feature Rate (%)	3.9%	33.7%	

Item	Environment	Condition	Current Week		Previous Week		Previous Year	
			Stores	Wtd Avg (\$)	Stores	Wtd Avg (\$)	Stores	Wtd Avg (\$)

WHOLE - DOLLARS PER LB

Fresh

CAPON	Conventional	Fresh			19,140	2.28
WHOLE BAGGED FRYER	Conventional	Fresh	12	1.39	19,140	1.08
WHOLE BAGGED FRYER	USDA Organic	Fresh			9,570	4.72
WHOLE BAGGED ROASTER	Antibiotic Free	Fresh	212	1.52		
WHOLE BAGGED ROASTER	Conventional	Fresh			19,140	1.08
WHOLE BAKING HEN	Conventional	Fresh			19,140	1.28
WHOLE CORNISH HEN	Conventional	Fresh			19,140	2.28
WHOLE CUT-UP FRYER	Conventional	Fresh			19,140	1.19
WHOLE HEAVY FOWL	Conventional	Fresh	20	1.49	19,140	1.14
WHOLE LIGHT FOWL	Conventional	Fresh			19,140	1.18



PARTS - DOLLARS PER LB

Fresh

9 PIECE COMBO, DRUM-THIGH-BREAST	Conventional	Fresh			19,140	2.28
9 PIECE COMBO, DRUM-THIGH-WING	Conventional	Fresh			19,140	2.38
BREAST CUTLETS/CHOPS	Conventional	Fresh	27	3.99	19,140	2.58
BREAST CUTLETS/CHOPS	Free Range	Fresh	37	6.99		
BREAST TENDERS, REGULAR PACK	Antibiotic Free	Fresh	54	6.44		
BREAST TENDERS, REGULAR PACK	Conventional	Fresh	59	4.27	19,140	2.58
BREAST TENDERS, VALUE PACK	Conventional	Fresh			19,140	2.48
BREAST, BONELESS/SKINLESS MARINATED	Conventional	Fresh	14	2.99	19,140	3.58
BREAST, BONELESS/SKINLESS THIN-SLICED	Antibiotic Free	Fresh	27	4.99		
BREAST, BONELESS/SKINLESS THIN-SLICED	Conventional	Fresh	55	3.99	19,140	2.68
BREAST, BONELESS/SKINLESS, REGULAR PACK	Antibiotic Free	Fresh			9,570	6.02
BREAST, BONELESS/SKINLESS, REGULAR PACK	Conventional	Fresh	28	3.42	19,140	2.38
BREAST, BONELESS/SKINLESS, VALUE PACK	Conventional	Fresh	221	2.33	19,140	2.58
BREAST, SPLIT BONE-IN, REGULAR PACK	Conventional	Fresh	41	1.86		
CAPON	Conventional	Fresh			19,140	5.08
DRUMSTICKS, REGULAR PACK	Antibiotic Free	Fresh	272	1.79		
DRUMSTICKS, REGULAR PACK	Conventional	Fresh	106	1.44	19,140	1.08
DRUMSTICKS, VALUE PACK	Antibiotic Free	Fresh	57	1.54		
DRUMSTICKS, VALUE PACK	Conventional	Fresh	98	1.13	19,140	1.07
DRUMSTICKS, VALUE PACK	Free Range	Fresh			9,570	4.71
LEG MEAT, BONELESS SKINLESS	Conventional	Fresh	55	2.29	19,140	1.14



LEG MEAT, BONELESS SKINLESS	Kosher	Fresh			9,570	4.78
LEG MEAT, BONELESS SKINLESS MARINATED	Conventional	Fresh	55	2.29	19,140	1.28
LEG QUARTERS, BAGGED	Conventional	Fresh	68	1.05	19,140	1.07
LEG QUARTERS, TRAY PACK	Antibiotic Free	Fresh	107	0.79		
LEG QUARTERS, TRAY PACK	Conventional	Fresh			19,140	1.28
LEGS	Conventional	Fresh			19,140	1.14
THIGHS, BONELESS/SKINLESS, REGULAR PACK	Conventional	Fresh	14	2.49	19,140	2.68
THIGHS, BONELESS/SKINLESS, VALUE PACK	Conventional	Fresh			19,140	2.58
THIGHS, REGULAR PACK	Antibiotic Free	Fresh	272	1.79		
THIGHS, REGULAR PACK	Conventional	Fresh	37	2.19	19,140	1.08
THIGHS, VALUE PACK	Conventional	Fresh	98	1.13	19,140	1.07
WHOLE WINGS	Conventional	Fresh	43	2.76	19,140	2.08

GROUND - DOLLARS PER LB

Fresh

GROUND	Antibiotic Free	Fresh	20	3.99		
GROUND	Conventional	Fresh			19,140	4.08
GROUND BREAST, 90-93%	Conventional	Fresh	37	3.49	19,140	5.08
GROUND BREAST, 98-100%	Conventional	Fresh			19,140	6.08
GROUND PATTIES	Conventional	Fresh			19,140	5.08

IQF - DOLLARS PER LB

Frozen

BREAST TENDERS, IQF	Conventional	Frozen			19,140	1.58
BREAST, BONELESS/SKINLESS, IQF	Conventional	Frozen			19,140	2.08
PARTY WINGS, IQF	Conventional	Frozen	29	2.25	19,140	2.58
WHOLE WINGS, IQF	Conventional	Frozen	29	2.00	19,140	2.58

PREPARED - DOLLARS EACH

Prepared

FRIED/BAKED CHICKEN, 8-PIECE MIX	Conventional	Prepared			9,570	10.13
FRIED/BAKED, 12-PIECE	Conventional	Prepared			9,570	12.13
FRIED/BAKED, 8-PIECE DARK	Conventional	Prepared	234	9.69	9,570	8.13
ROTISSERIE LEG QUARTER	Conventional	Prepared			9,570	2.63



ROTISSERIE WHOLE BREAST	Conventional	Prepared			9,570	5.13
ROTISSERIE WHOLE, 2.1-3.0 LBS.	Conventional	Prepared			9,570	9.13
ROTISSERIE WHOLE, LESS THAN 2 LBS.	Conventional	Prepared	38	8.99	9,570	8.13
ROTISSERIE WHOLE, LESS THAN 2 LBS.	Halal	Prepared			9,570	11.72

PREPARED - DOLLARS PER LB

Prepared

FRIED/BAKED BONE-IN WINGS	Conventional	Prepared	71	5.99	9,570	7.13
FRIED/BAKED BONELESS WINGS	Conventional	Prepared	71	5.99	9,570	6.13
FRIED/BAKED BREAST STRIPS	Conventional	Prepared			9,570	5.13
FRIED/BAKED BREAST TENDERS	Conventional	Prepared	71	8.99	9,570	8.13
FRIED/BAKED POPCORN CHICKEN	Conventional	Prepared			9,570	8.13

PREPARED - DOLLARS PER PIECE

Prepared

FRIED/BAKED CHICKEN, BULK PACK (\$/PIECE)	Conventional	Prepared			9,570	1.14
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SERVICE DELI - DOLLARS PER LB

Prepared

SERVICE DELI CAT 1	Conventional	Prepared	234	10.60	9,570	10.13
SERVICE DELI CAT 1	Free Range Organic	Prepared			9,570	13.72
SERVICE DELI CAT 2	Conventional	Prepared			9,570	7.13

SELF-SERVICE DELI - DOLLARS EACH

Prepared

SELF-SERVICE DELI TUB/POUCH 7-10 OUNCES	Conventional	Prepared	74	12.17	9,570	6.13
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NORTHEAST REGION (CT, DE, MA, MD, ME, NH, NJ, NY, PA, RI, VT)

METRICS

	Total Outlets	Feature Rate	Activity Index
Current Week	5,058	19.1%	2,108



IQF - DOLLARS PER LB



Frozen

PARTY WINGS, IQF	Conventional	Frozen	29	2.25 - 2.25	2.25
WHOLE WINGS, IQF	Conventional	Frozen	29		2.00

PREPARED - DOLLARS EACH

Prepared

FRIED/BAKED, 8-PIECE DARK	Conventional	Prepared	163	9.99 - 9.99	9.99
ROTISSERIE WHOLE, LESS THAN 2 LBS.	Conventional	Prepared	38	8.99 - 8.99	8.99

SERVICE DELI - DOLLARS PER LB

Prepared

SERVICE DELI CAT 1	Conventional	Prepared	163	9.99 - 9.99	9.99
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SELF-SERVICE DELI - DOLLARS EACH

Prepared

SELF-SERVICE DELI TUB/POUCH 7-10 ounces	Conventional	Prepared	74	10.65 - 10.65	12.17
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SOUTHEAST REGION (AL, FL, GA, MS, NC, SC, TN, VA, WV)

METRICS

	Total Outlets	Feature Rate	Activity Index
Current Week	7,284	0.2%	77

	Environment	Condition	Stores	Processor Brand (\$)	Store Brand (\$)	Wtd Avg (\$)
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PARTS - DOLLARS PER LB

Fresh

DRUMSTICKS, VALUE PACK	Conventional	Fresh	11	0.99 - 0.99	0.99
THIGHS, VALUE PACK	Conventional	Fresh	11	0.99 - 0.99	0.99

PREPARED - DOLLARS EACH

Prepared

FRIED/BAKED, 8-PIECE DARK	Conventional	Prepared	11	8.99 - 8.99	8.99
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PREPARED - DOLLARS PER LB



Prepared

FRIED/BAKED BONE-IN WINGS	Conventional	Prepared	11	5.99 - 5.99	5.99
FRIED/BAKED BONELESS WINGS	Conventional	Prepared	11	5.99 - 5.99	5.99
FRIED/BAKED BREAST TENDERS	Conventional	Prepared	11	8.99 - 8.99	8.99

SERVICE DELI - DOLLARS PER LB

Prepared

SERVICE DELI CAT 1	Conventional	Prepared	11	11.99 - 11.99	11.99
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MIDWEST REGION (IA, IL, IN, KY, MI, MN, NE, OH, SD, WI)

METRICS

	Total Outlets	Feature Rate	Activity Index
Current Week	5,600	0.3%	84

	Environment	Condition	Stores	Processor Brand (\$)	Store Brand (\$)	Wtd Avg (\$)
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PARTS - DOLLARS PER LB

Fresh

BREAST, BONELESS/SKINLESS MARINATED	Conventional	Fresh	14			2.99
BREAST, SPLIT BONE-IN, REGULAR PACK	Conventional	Fresh	14			1.99
DRUMSTICKS, REGULAR PACK	Conventional	Fresh	14			0.99
LEG QUARTERS, BAGGED	Conventional	Fresh	14			1.29
THIGHS, BONELESS/SKINLESS, REGULAR PACK	Conventional	Fresh	14			2.49
WHOLE WINGS	Conventional	Fresh	14			2.69

SOUTH CENTRAL REGION (AR, CO, KS, LA, MO, NM, OK, TX)

METRICS

	Total Outlets	Feature Rate	Activity Index
Current Week	4,892	1.5%	444

	Environment	Condition	Stores	Processor Brand (\$)	Store Brand (\$)	Wtd Avg (\$)
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WHOLE - DOLLARS PER LB

Fresh

WHOLE BAGGED FRYER	Conventional	Fresh	12			1.39
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PARTS - DOLLARS PER LB

<u>Fresh</u>						
BREAST, BONELESS/SKINLESS, REGULAR PACK	Conventional	Fresh	12			3.99
DRUMSTICKS, VALUE PACK	Conventional	Fresh	60	0.99 - 0.99		0.99
THIGHS, VALUE PACK	Conventional	Fresh	60	0.99 - 0.99		0.99

PREPARED - DOLLARS EACH

<u>Prepared</u>						
FRIED/BAKED, 8-PIECE DARK	Conventional	Prepared	60		8.99 - 8.99	8.99

PREPARED - DOLLARS PER LB

<u>Prepared</u>						
FRIED/BAKED BONE-IN WINGS	Conventional	Prepared	60		5.99 - 5.99	5.99
FRIED/BAKED BONELESS WINGS	Conventional	Prepared	60		5.99 - 5.99	5.99
FRIED/BAKED BREAST TENDERS	Conventional	Prepared	60		8.99 - 8.99	8.99

SERVICE DELI - DOLLARS PER LB

<u>Prepared</u>						
SERVICE DELI CAT 1	Conventional	Prepared	60	11.99 - 11.99		11.99

SOUTHWEST REGION (AZ, CA, NV, UT)

METRICS

	Total Outlets	Feature Rate	Activity Index			
Current Week	4,342	1.3%	220			
	Environment	Condition	Stores	Processor Brand (\$)	Store Brand (\$)	Wtd Avg (\$)

PARTS - DOLLARS PER LB

<u>Fresh</u>						
BREAST, BONELESS/SKINLESS THIN-SLICED	Conventional	Fresh	55		3.99 - 3.99	3.99
DRUMSTICKS, REGULAR PACK	Conventional	Fresh	55		1.19 - 1.19	1.19
LEG MEAT, BONELESS SKINLESS	Conventional	Fresh	55		2.29 - 2.29	2.29
LEG MEAT, BONELESS SKINLESS MARINATED	Conventional	Fresh	55		2.29 - 2.29	2.29



Foot Notes:

FEATURE RATE: the amount of sampled stores advertising any reported item during the current week, expressed as a 'percentage of the total sample.

ACTIVITY INDEX: a measure of the absolute frequency of feature activity equal to the total number of stores for each advertised item (e.g., a retailer with 100 outlets featuring 3 items has an activity index of 300).

STORES/AVG: the number of advertising outlets and the weighted average price weighted by the respective number of outlets.

BRANDED: includes any advertised beef cuts marketed under a corporate trademark, or under one of Meat Grading & Certification Branch's Certified Beef programs.

NON-LABELED/OTHER: Beef cuts advertised without a USDA Quality Grade.

USDA Certified Organic are products grown and processed according to USDA's national organic standards and certified by USDA-accredited State and private certification organizations. **Local:** Featured items labeled as "Local". **Grass Fed:** Featured items labeled as "Grass Fed".

Click here to view the Local and Organic Premium Report: <https://mymarketnews.ams.usda.gov/viewReport/2172>